

# **ACF Grants Extranet Internal User Procedures Guide**



**Prepared by:**

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Office of Administration  
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## Introduction

### About This User's Guide

*The Administration for Developmental Disabilities Extranet Internal User Procedures Guide s* provides step-by-step instructions for performing various functions reserved for internal users, such as reviewing and approving forms on the Administration for Children and Families' Extranet.

### How This User's Guide Is Organized

The User's Guide is organized in four primary sections: this *Introduction*, *Beginning Your Work*, *Step-by-Step Instructions*, and a *Glossary* of important terms.

The *Step-by-Step Instructions* use several conventions: Keyboard actions (clicking your mouse, scrolling, pressing Enter or Tab) are noted in **boldface type**. Instructions are indented and preceded by bullets. Explanatory material is printed within a box.

### ACF Grants Extranet Form Review Process Overview

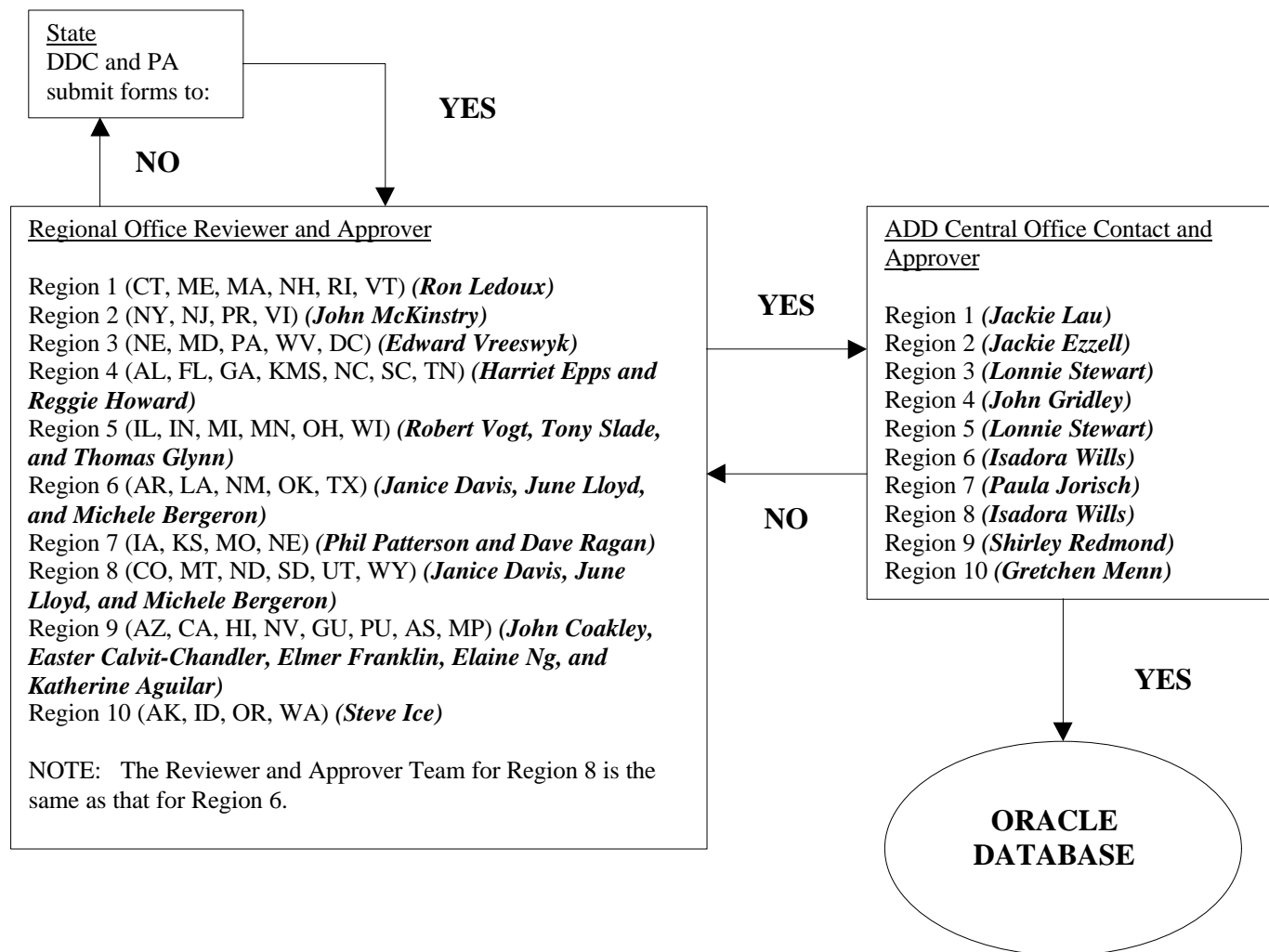
The ACF Grants Extranet uses a structured workflow process to ensure that electronic data is properly submitted and processed.

- A member of a grantee organization logs onto the ACF Grants Extranet with a user name and password that have been established and approved by ACF. This representative of a grantee organization fills out a form and submits it to the proper ACF employee in the appropriate ACF Regional Office (the Regional contact). Each grantee organization is pre-assigned to a Regional Office contact. Notification of the submission is sent to the Regional contact via e-mail. The grantee cannot edit the form once it has been sent to the Regional contact unless it is returned to revision.
  - The Regional contact reviews the form. If the form is **acceptable**, the Regional contact submits it to someone else in his or her workgroup for further review. The next reviewer could be another person in the Regional Office or someone else in the ACF Central Office. If the form is accepted and forwarded for further review, an e-mail notification is sent to the next reviewer notifying him or her that a form is ready for their review.
  - If the form is **unacceptable**, the Regional contact returns the form to the grantee for revision. If the form is returned for revision, an e-mail notification is sent to the grantee notifying him or her of the form's status and requesting that revisions must be made.
- The ACF Central Office reviews a form that has been forwarded by the Regional Office. The Central Office reviewer can either accept the form or return it for revision. If the ACF Central Office reviewer deems the form **acceptable**, he or she "**locks in**" the form; the data contained in the form is then final and official. If the ACF Central Office reviewer judges

the form **unacceptable**, he or she returns the form to the Regional Office reviewer, who returns it to the grantee for revision.

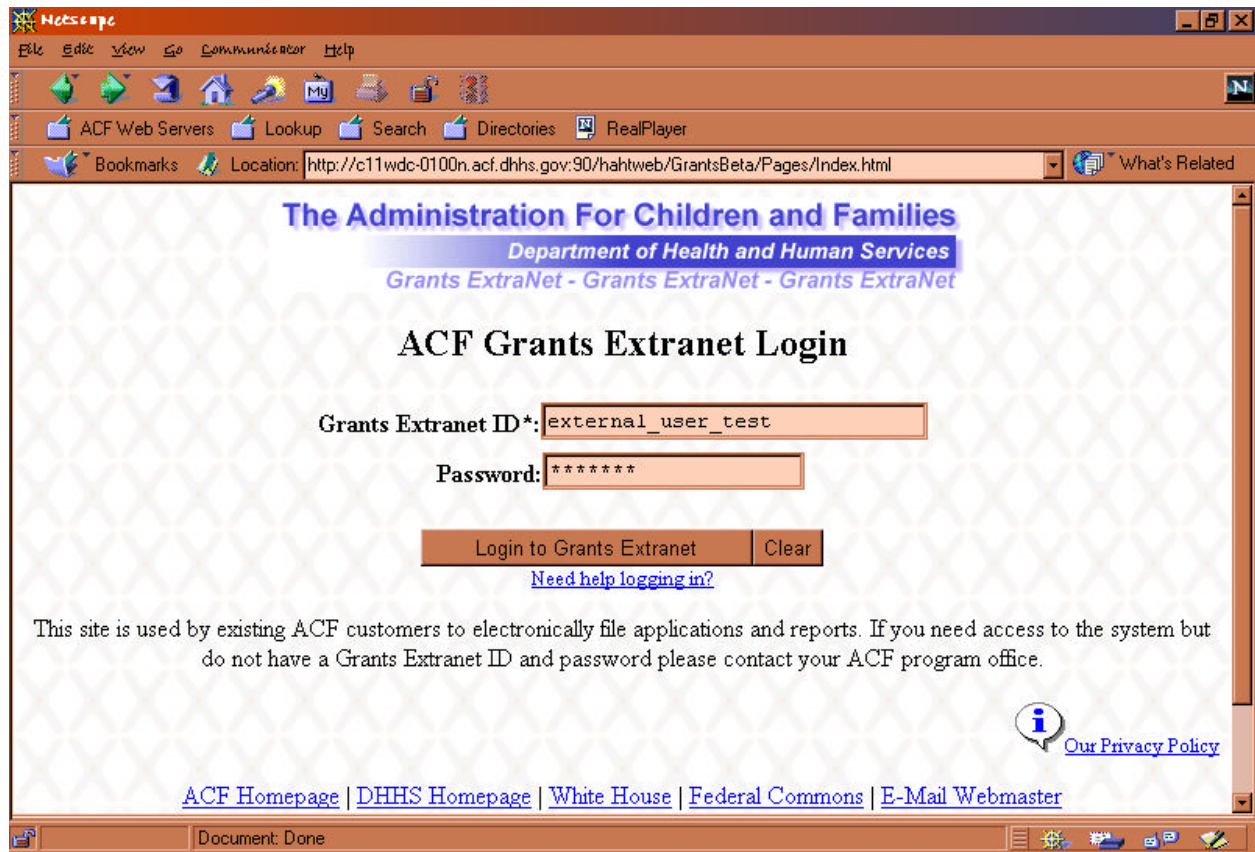
# Form Submittal Work Flow Illustration

(Current as of September 1999)



## Beginning Your Work

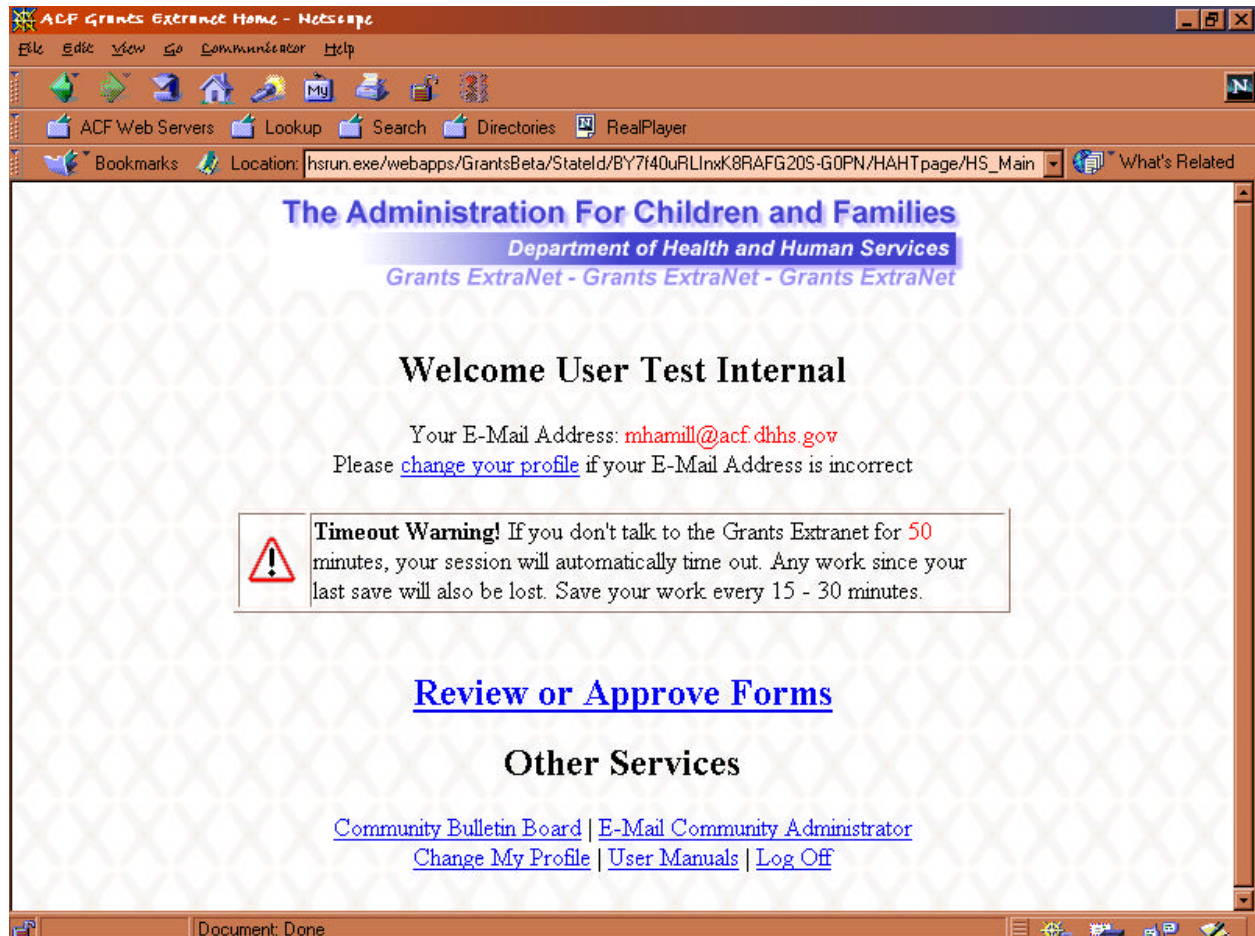
- Log in to ACF Grants Extranet at <https://extranet.acf.dhhs.gov>



## Step-by-Step Instructions

### Review or Approve Forms

- At the **Welcome** screen, **click on** the link for **Review or Approve Forms**



- The forms that have been sent to you for review are listed.
- **Click on** the link for the form you wish to review.

**Filled Form Management - Netscape**

File Edit View Go Communicator Help

ACF Web Servers Lookup Search Directories RealPlayer

Bookmarks Location: s/GrantsBeta/Stateld/BY7f40uRLInxK8RAFG20S-G0PN/HAHT\_page/HS\_FilledFormManagement What's Related

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## Filled Form Management

You belong to the following work groups:

WORK GROUP	COMMUNITY	APPROVAL AUTHORITY
Beta Test DDC Workgroup	Developmental Disability Council	<input type="checkbox"/>
Beta Test P&A Workgroup	Protection & Advocacy	<input type="checkbox"/>

These forms are marked for your attention:

STATE	ORGANIZATION NAME	FORM TYPE	USER DEFINED FORM NAME	LAST ROUTED FROM	LAST ROUTED DATE
MD	ADD Testing	Statement of Objective and Priorities	<a href="#">1119999</a>	ssay_external	11/19/99 2:41:25 PM
MD	ADD Testing	Statement of Objective and Priorities	<a href="#">nov18sop</a>	ssay_external	11/18/99 1:58:13 PM
MD	ADD Testing	Statement of Objective and Priorities	<a href="#">testing with Roopa 11/19</a>	ssay_external	11/19/99 2:42:32 PM
VA	DDC Test	Statement of Objective and Priorities	<a href="#">Mark Test 10/13</a>	external_user_test	10/13/99 1:55:54 PM

Document: Done



- **Click on** the link for each form part you want to review. The form part as submitted by the grantee appears on the screen. Review the information contained in each form part until you have reviewed all the form parts submitted.

Form Part Management - Netscape

File Edit View Go Communicator Help

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Bookmarks Location: ID=3&FILLED\_FORM\_ID=501&INSTANCE\_NAME=1119999&IS\_DRAFT=0&IS\_UPDATEABLE=1 What's Related

Update Comments View Form History

Approve Form Return This Form

Click on the form part to review. **Note that you cannot update any information on the form.**

PART NAME	LAST SAVED	LAST SAVED BY
<a href="#">Section I - Identification</a>		-
<a href="#">Section II - Public Comment</a>		-
<a href="#">Section III - Priorities--Priority-1--Part A</a>	11/19/1999 02:35:30	ssay_external
<a href="#">Section III - Priorities--Priority-1--Part B</a>	11/19/1999 02:35:30	ssay_external
<a href="#">Section III - Priorities--Priority-1--Part C</a>	11/19/1999 02:35:30	ssay_external
<a href="#">Section III - Priorities--Priority-1--Part D</a>	11/19/1999 02:35:30	ssay_external
<a href="#">Section III - Priorities--Priority-2--Part A</a>	11/19/1999 02:36:57	ssay_external
<a href="#">Section III - Priorities--Priority-2--Part B</a>	11/19/1999 02:36:57	ssay_external
<a href="#">Section III - Priorities--Priority-2--Part C</a>	11/19/1999 02:36:57	ssay_external
<a href="#">Section III - Priorities--Priority-2--Part D</a>	11/19/1999 02:36:57	ssay_external

Filled Form Management

Document: Done

After you have completed reviewing the entire form, you may click on any of the following buttons:

***Update Comments***

***View Form History***

***Approve Form***

***Return This Form***

***(Central Office Reviewers Only) Lock in this Form***

These buttons are self-explanatory.

## Approving a Form

- **Click on** the **Approve Form** button.
- The **Form Approval Mail Message** screen appears.
- **Click on** the *drop-down list box arrow* to the right of the label **TO: Next Reviewer's Name**.
- A list of possible reviewers appears. **Click on** the name of the next person you want to review the form. These people will be members of your pre-defined work group. They may be Regional Office or Central Office staff.
- **Optional: Click on** the *text boxes* next to the **CC:** and **BCC:** labels. **Type** the *Internet* e-mail addresses of any other people to whom you wish a copy of this **message** to be sent. (NOTE: Only the next reviewer can access the form for review -- the people who receive copies of the message may not review the form unless it is sent to them directly by another reviewer. The message merely provides information about the location of the form in the workflow process to those who receive copies of the message.)
- **Click on** the *Subject text box*. **Type** a **subject** for your e-mail message. Be sure to include the STATE ABBREVIATION of the state grantee that submitted the form in your subject line.
- **Click on** the **Your Message** *text box*. **Type** any message you wish to include. A default message has been supplied. You may accept it or edit it.
- **Optional: Attaching a File**
  - **Click on** the **Browse** button to access your Windows directories. Using normal Windows procedures, locate and click on the name of the file you wish to attach to your e-mail message. If attachments are large or you have a slow connection to the Internet, it may take a number of minutes to transmit the file. You may want to consider compressing large files using a program such as WinZip.
- **Click on** the **Submit Form** button to place the form in a special holding area on the ACF Grants Extranet and to send the notification message you have just composed to the next reviewer. The form is then marked for the attention of the next reviewer.

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Approve a Form


1119999

CURRENT COMMENTS (you may wish to update these at this time)

please review MD SOP form

## Form Approval Mail Message

You may route this to any member of your workgroup except yourself. Routing notification is done by E-Mail. You are expected to know who this person should be. Your Community Administrator is responsible for maintaining work groups. If you do not find the right person in your workgroup please [contact your Community Administrator](#).

<b>TO: Next Reviewer's Name</b>	<input type="text"/>
<b>CC:</b> (Optional; separate addresses with commas)	<input type="text"/>
<b>BCC:</b> (Optional; separate addresses with commas)	<input type="text"/>
<b>From:</b>	<b>mhamill@acf.dhhs.gov</b> (If incorrect, <a href="#">update your profile</a> first. Then log out and log back in again.)
<b>Subject:</b>	Form Approval
<b>Your Message:</b>	<div>I have examined the form titled '1119999' on the ACF Grants  </div> <div></div>
<b>Attach File</b> (Optional):	<div><input type="text"/></div> <div>(You do not need to attach your form -- it exists in a holding area.)</div> <div> If attachments are large and you have a slow connection to the Internet, it may take a number of minutes to transmit the file. If the file is large, consider compressing it first using a program such as <a href="#">WinZIP</a> to compress it.</div>



Your message will be sent through an ACF mail server.

[Cancel Form Submission](#)

[Grants Extranet Home](#) | [Log Off](#)

## Returning a Form

- **Click on the Return This Form button.**
- The **Return Form Mail Message** screen appears.
- The e-mail address of the person who submitted the form is automatically inserted in the *text box* to the right of the **TO:** label. This will be the STATE grantee contact for reviewers at the Regional Office level and REGIONAL OFFICE CONTACT for reviewers at the Central Office level.
- **Optional: Click on the text boxes** next to the **CC:** and **BCC:** labels. **Type the Internet** e-mail addresses of any other people to whom you wish a copy of this **message** to be sent. **NOTE: Only the form submitter can access the form to revise it -- the people who receive copies of the message may not review the form. The message merely provides information about the location of the form in the workflow process to those who receive copies of the message.)**
- **Click on the Subject: text box.** **Type a Subject** for your e-mail message.
- **Click on the Your Message text box.** **Type** any message you wish to include. A default message has been automatically entered. You may accept it or edit it.
- **Optional: Attaching a File**
  - **Click on the Browse button** to access your Windows directories. Using normal Windows procedures, locate and click on the name of the file you wish to attach to your mail message. If attachments are large or you have a slow connection to the Internet, it may take a number of minutes to transmit the file. You may want to consider compressing large files using a program such as WinZip.
- **Click on the Submit Form button** to place the form in a special holding area and send the notification message to the appropriate person. If the Regional Office reviewer is the person returning the form, it will be sent to the State-level grantee for revision. If the Central Office reviewer is the person returning the form, it will be sent to the Regional Office contact, who will then send it to the State-level grantee for revision.

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Return a Form


1119999

CURRENT COMMENTS (you may wish to update these at this time)

please review MD SOP form

## Form Return Mail Message

The form is routed to the person who submitted the form for approval. If this is not the right person please [contact your Community Administrator](#).

<b>TO:</b>	<input type="text"/>
<b>CC:</b> (Optional; separate addresses with commas)	<div><input type="text"/></div> <div><input type="text"/></div> <div>Note: Use <i>Internet addresses</i>, not Banyan Vines addresses.</div>
<b>BCC:</b> (Optional; separate addresses with commas)	<div><input type="text"/></div> <div><input type="text"/></div> <div>Note: Use <i>Internet addresses</i>, not Banyan Vines addresses.</div>
<b>From:</b>	ssay@acf.dhhs.gov (If incorrect, <a href="#">update your profile</a> first. Then log out and log back in again.)
<b>Subject:</b>	Your Form Has B
<b>Your Message:</b>	<div>I have examined the form titled "1119999" on the ACF Grants</div> <div><input type="text"/></div>
<b>Attach File</b> (Optional):	<div><input type="text"/></div> <div>(You do not need to attach your form -- it exists in a holding area.)</div> <div> If attachments are large and you have a slow connection to the Internet, it may take a number of minutes to transmit the file. If the file is large, consider compressing it first using a program such as <a href="#">WinZIP</a> to compress it.</div>



Your message will be sent through an ACF mail server.

[Cancel Form Submission](#)

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## Locking in a Form (Central Office Reviewers Only)


- **Click on the Lock In Form button.**
- The **Form Lock In Mail Message** screen appears.
- The e-mail address of the first person who submitted the form will be inserted automatically into the *text box* to the right of the **TO:** label. This will be the State-level grantee.
- **Optional: Click on the text boxes** next to the **CC:** and **BCC:** labels. **Type the Internet** e-mail address of any other people to whom you wish a copy of this message to be sent.  
**NOTE: Be sure to send a copy of the Form Lock In Mail Message to the Regional Office contact.**
- **Click on the Subject text box.** **Type a Subject** for your e-mail message. Be sure to include the STATE ABBREVIATION of the State in which the grantee is located.
- **Click on the Your Message text box.** **Type** any message you wish to include. A default message has been supplied. You may accept it or edit it.
- **Optional: Attaching a File**
  - **Click on the Browse button** to access your Windows directories. Using normal Windows procedures, locate and click on the name of the file you wish to attach to your mail message. If attachments are large or you have a slow connection to the Internet, it may take a number of minutes to transmit the file. You may want to consider compressing large files using a program such as WinZip.
- **Click on the Submit Form button** to finalize the data in the form and to send the notification message. Forms that have been locked in are final and may not be edited.

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**Lock in a Form**


**1119999**

**CURRENT COMMENTS** (you may wish to update these at this time)



### Form Lock In Mail Message

The form is routed to the person who submitted the form for approval. If this is not the right person please [contact your Community Administrator](#).

<b>TO:</b>	<input type="text"/>
<b>CC:</b> (Optional; separate addresses with commas)	<div><input type="text"/></div> <div>Note: Use <i>Internet addresses</i>, not Banyan Vines addresses.</div>
<b>BCC:</b> (Optional; separate addresses with commas)	<div><input type="text"/></div> <div>Note: Use <i>Internet addresses</i>, not Banyan Vines addresses.</div>
<b>From:</b>	<b>ssay@acf.dhhs.gov</b> (If incorrect, <a href="#">update your profile</a> first. Then log out and log back in again.)
<b>Subject:</b>	Your Form Has E
<b>Your Message:</b>	<div>I have locked in the form titled "1119999" on the ACF Grants</div> <div><input type="text"/></div>
<b>Attach File</b> (Optional):	<div><input type="text"/></div> <div>(You do not need to attach your form -- it exists in a holding area.)</div> <div> If attachments are large and you have a slow connection to the Internet, it may take a number of minutes to transmit the file. If the file is large, consider compressing it first using a program such as <a href="#">WinZIP</a> to compress it.</div>



Your message will be sent through an ACF mail server.

[Cancel Form Submission](#)

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## **Glossary**

### **ACF Grants Extranet**

An Internet-based system that allows grantees and employees of the Administration for Families and Children to securely report, manage, monitor, and receive grantee-related information.

### **Approve (a filled form)**

Process by which a Regional Office or Central Office Reviewer accepts the form data submitted by a grantee.

### **Community**

A set of internal users who work together to solve a common ACF problem. Typically, a community is a functional area of an ACF Program Office. For example, Protection and Advocacy is a community within the Administration on Developmental Disabilities program office. However, an ACF community may cross many program offices or be ACF-wide in scope.

### **Community Administrator**

A designated member of an ACF community who is empowered to facilitate access to the system for the internal and external users associated with their community.

### **Dynamic Form Parts**

Form parts that may be created multiple times as needed for each filled form (e.g., Priorities in the PA Statement of Objectives and Priorities)

### **External Users**

People who are not employed by ACF but who require access to the Grants Extranet. They typically work for a grantee organization.

### **Filled Form**

A blank form and its associated data. A filled form is always associated with a unique grantee organization.

### **Filled Form Part**

A logical section of a filled form.

### **Form Submitter**

Person in a grantee organization who submits a filled form from the Protection and Advocacy (P&A) system or the Developmental Disability Council (DDC).



**Internal User**

Person who is employed by ACF who requires access to the ACF Grants Extranet. Typical, this is a government employee or a contractor assigned to review and approve forms. The internal user may be located in a Regional Office or in the Central Office.

**Lock in (a filled form)**

Process by which the final Central Office reviewer accepts the filled form data as a final submission. After a form is locked in, the data it contains cannot be changed and is submitted to the Oracle database.

**Return (a filled form)**

Process by which a Regional Office or Central Office reviewer returns a filled form to the form submitter (or to the Regional Office for transmittal to the form submitter) for revision.

**Reviewer**

Anyone in ACF who is designated to review, to comment upon, or to recommend for approval or denial filled forms submitted by external users.

**Work Group**

One or more internal users who work together as a collaborative group to review, process, and approve data submitted by external users.